

## COMPUTERS/HILLEL SEGAL

# FollowUp keeps track of clients

FollowUp is the apt name for a personal computer program that lets your secretary or assistant follow up on your business contacts. Client and prospect information can be juggled and displayed on an IBM PC or PC-compatible just like with a Rolodex file and an appointment book — only faster and more accurately.

The \$295 program by Larsen Cotton Inc. of Englewood has many advanced features, but it lacks two that are commonly offered by less-sophisticated and less-expensive competitors.

First, unlike Lotus's Metro, which I reviewed last week, FollowUp doesn't have automatic phone dialing, a popular feature with telemarketers and executives who may wish to use the program themselves.

Second, unlike SaleMaker and other memory-resident programs

that store data in memory and react almost instantly to typed commands, FollowUp sometimes responds sluggishly as it accesses the computer's hard disk.

On the positive side, FollowUp has more sophisticated features and can store more data for each contact than Lotus Metro and typical memory-resident programs. You can input 16,000 characters or about 10 pages of data in the comments section for each contact. In addition, you can develop up to 15 field reports to track each contact's history.

After contacts have been recorded, reports

can be accessed by using the full company or contact name or the beginning sequence of characters of that name.

Here are some other useful features:

✓ The program automatically changes the "last date contacted"

to the current date each time a contact record is worked.

✓ The program lets you input up to three important "milestone" dates, with brief descriptions to jog your memory — birthdays, premium due dates, renewal dates, etc. — in addition to the next date that you wish to contact the individual.

✓ The program lets you classify and sort records any way you choose, and pull up only those that are in a certain category, a certain city, or by any combination of parameters. You can pull up all prospects with call-backs due today with sales of more than \$1 million that haven't been recontacted more than three times.

✓ The program directly supports WordPerfect, WordStar and Microsoft Word, but appears biased toward WordPerfect for preparing custom and form letters.

✓ FollowUp can be linked with a word processing program to produce form letters. You can create many standard paragraphs for letters and then call them up by number in order to compose letters to

fit particular situations. Then, when you're ready to send a letter to a contact in your file, the program prompts you accordingly.

✓ Finally, the program can produce contact reports that summarize all actions taken for management. The reports show the date of each action and a short description such as "Made follow-up phone call to discuss info sent."

With all these features, however, comes complexity. The program is more difficult to learn and use compared with less-capable ones.

*The bottom line:* I'm impressed with FollowUp's features, but can't give a whole-hearted recommendation for individual executives and telemarketers because of the missing auto-dial feature, and because it's slower and harder to learn than newer memory-resident programs.

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